



# Better Together: Online Qualitative Design, Data Collection & Analysis



Dr. Janet Salmons She is a qualitative methodologist and author of 12 books, including: *Doing Qualitative Research Online* 2<sup>nd</sup> edition (2022), *What Kind of Researcher Are You?* (2021), *Reframing and Rethinking Collaboration in Higher Education and Beyond: A Practical Guide for Doctoral Students and Early Career Researchers* with Narelle Lemon (2021), *Publishing from your Doctoral Research: Create and Use a Publication Strategy* with Helen Kara (2020), *Learning to Collaborate, Collaborating to Learn* (2019), *Find the Theory in Your Research* (2019), and *Getting Data Online* (2019).

Dr. Salmons received a B.S. in Adult and Community Education from Cornell University; an M.A. in Social Policy Studies from the SUNY Empire State College, and a Ph.D. in Interdisciplinary Studies and Educational Leadership at the Union Institute & University. She lives and works in Boulder, Colorado.

Leon Bourner An award-winning client development professional, Leon has spent the past three years as Director, Sales and Client Development at itracks. In this time, he has helped hundreds of clients realize their qualitative research goals using dedicated online focus group, interview, and discussion board solutions. An integral part of itracks' strategic direction, he helped launch itracks Realtime in early 2021. His and his team's reception and translation of client feedback is a direct contributor to feature updates and the overall evolution of itracks solutions.

Dr. Stacy Penna has combined her educational and research experience with her work in the software industry and is delighted to be supporting and building a wider research community. Stacy earned a doctorate in education using NVivo for both her literature review and qualitative research. She has worked at QSR International, now Lumivero for 10 years and is excited for the future of research.



**DR. JANET SALMONS**  
Research Community Manager  
SAGE Methodspace

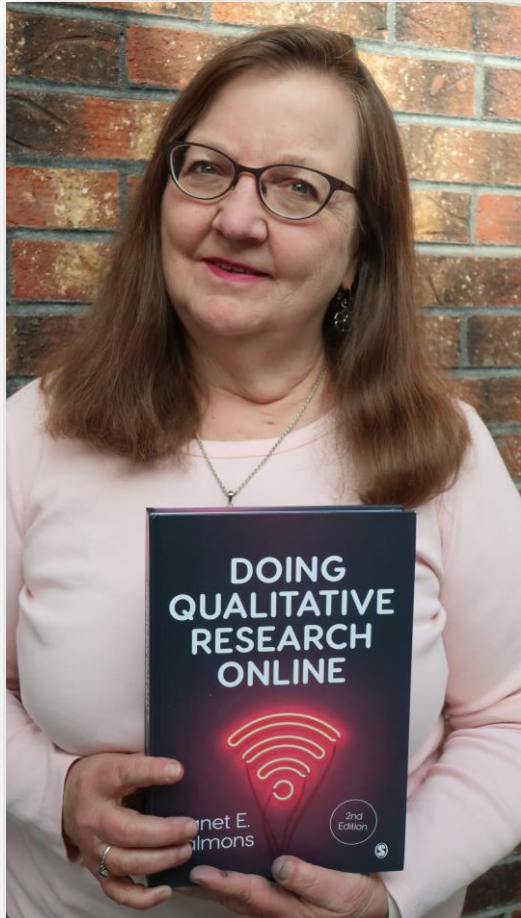


**LEON BOURNER**, Director of  
Sales and Client  
Development  
itracks



**DR. STACY PENNA**  
Customer Engagement and  
Enablement Director  
Lumivero

# Introduction: Dr. Janet Salmons




Qualitative methodologist  
and

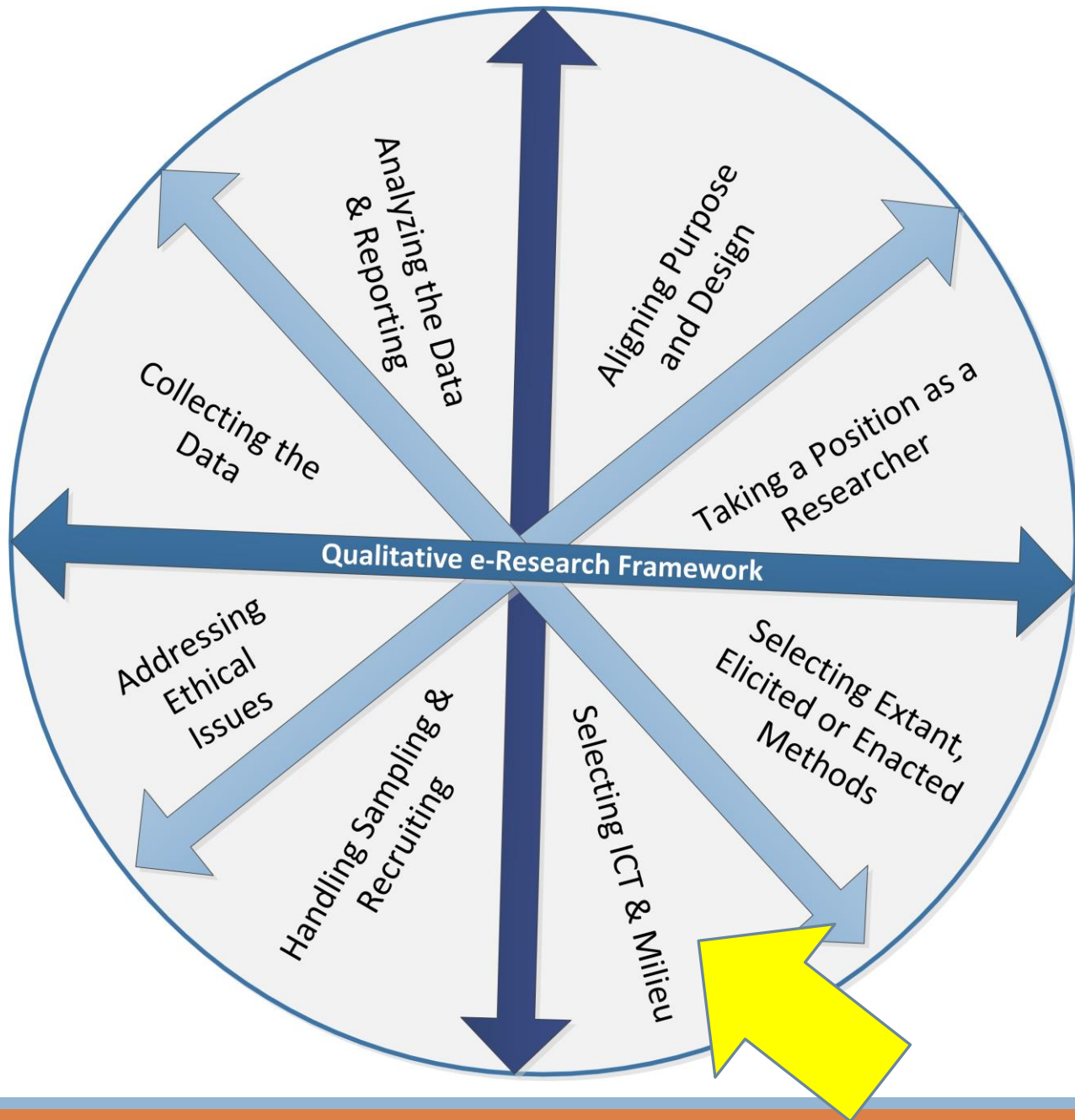
Research Community Manager for SAGE Methodspace  
[www.methodspace.com](http://www.methodspace.com)

# Our focus: Research with consenting participants

Typology of Methods	Data collected from:	Researcher and Participant
<b>Extant</b>	<ul style="list-style-type: none"><li>• Posts</li><li>• Archives</li><li>• Documents</li><li>• External observation</li><li>• Databases/datasets/Big Data</li></ul>	No direct contact with Individual participants.
<b>Elicited</b>	<ul style="list-style-type: none"><li>• <b>Interviews, 1-1/group</b></li><li>• Surveys or questionnaires</li><li>• Participant observation</li></ul>	<b>Questions or prompts used in interactions between researcher and one or more participants</b>
<b>Enacted</b>	<ul style="list-style-type: none"><li>• <b>Creative &amp; arts-based research</b></li><li>• Games and simulations</li><li>• Experiments</li></ul>	<b>Interaction &amp; collaboration involving researcher and one or more participants.</b>







The choice of internet and communications technology (ICT) is interrelated with all other aspects of the research design.

## Design Decision: 1-1 or Group?

### 1-1 Interview

Interviewer elicits responses from individuals with verbal, written, and/or visual questions and prompts.

### Group Interview

Interviewer elicits responses from multiple individuals with verbal, written, and/or visual questions and prompts.

### Focus Group

Facilitator encourages group interactions about their perceptions and experiences of a particular phenomenon.

# Design Decision: What is the ideal time between question and response?

**Synchronicity**  
Single-focus real-time dialogue

**Synchronous**  
Exchange in real time; other events may also occur

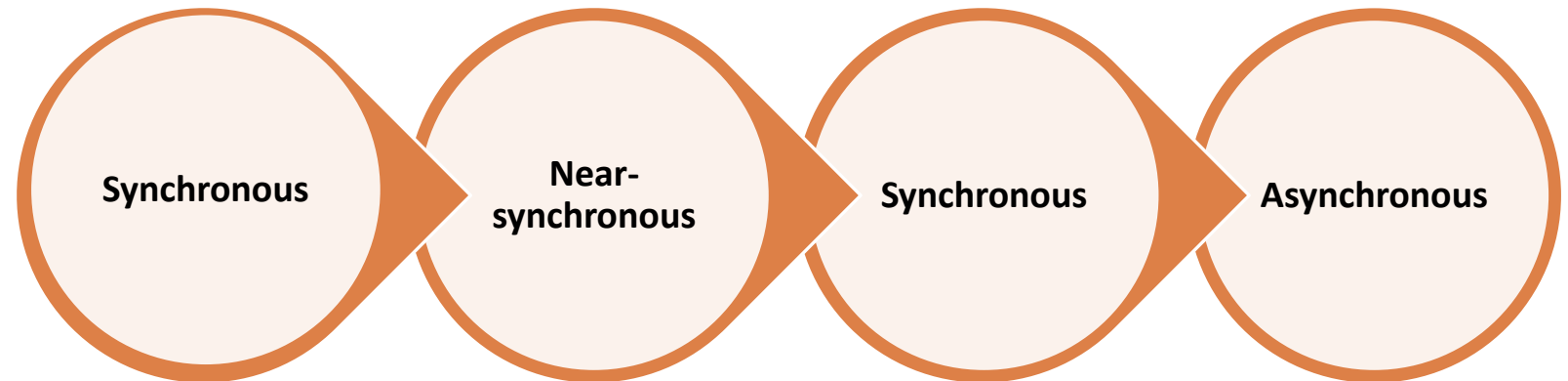
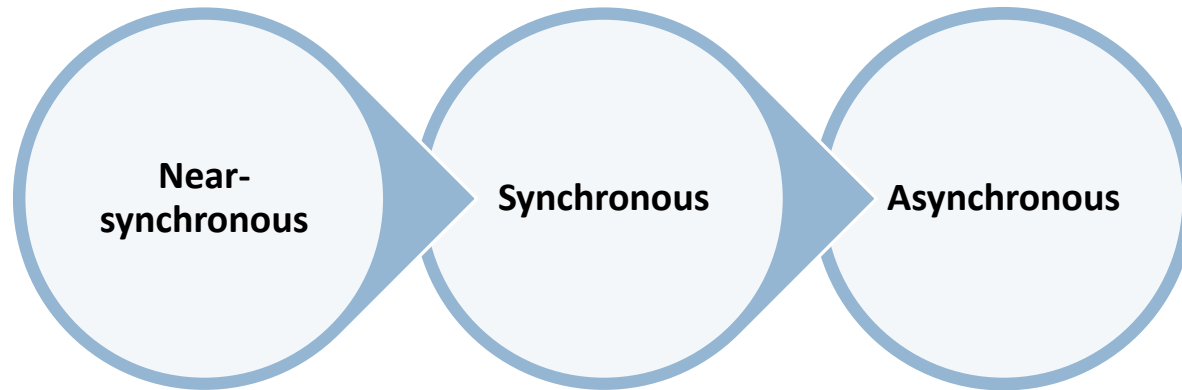
**Near synchronous**  
Near-immediate, ongoing post and response

**Asynchronous**  
Time lapse between message and response



## Design Decision:

What mix of communication modes fits the study?



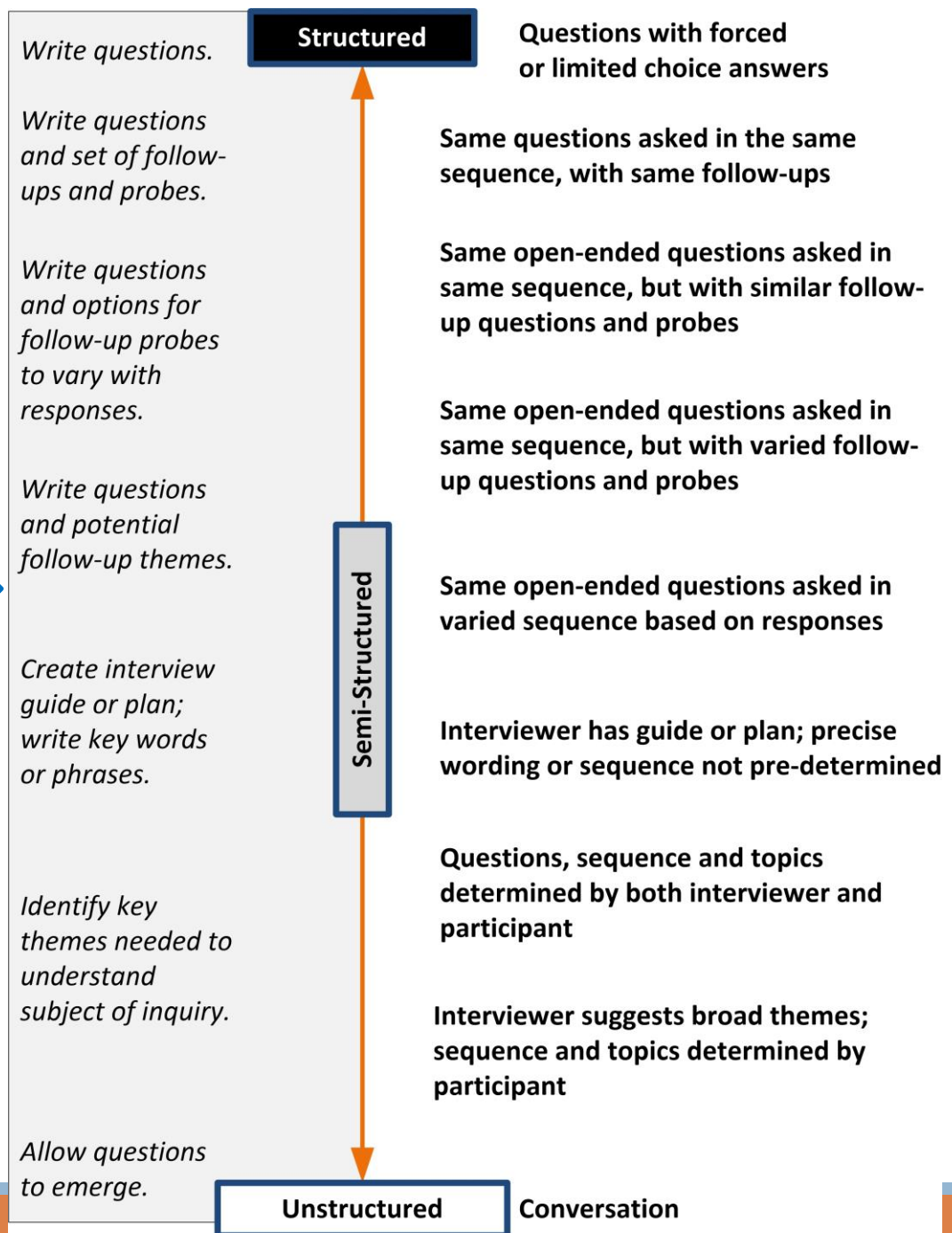
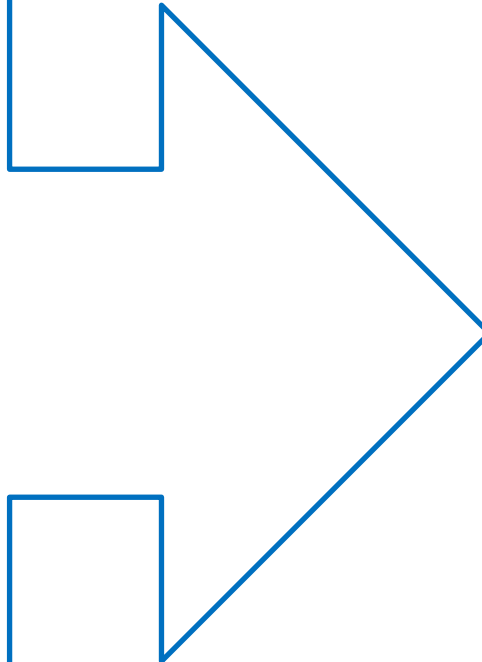


**Design Decision:**  
What type of question,  
prompt, or experience  
will elicit or generate  
data that fits the  
purpose of the study?



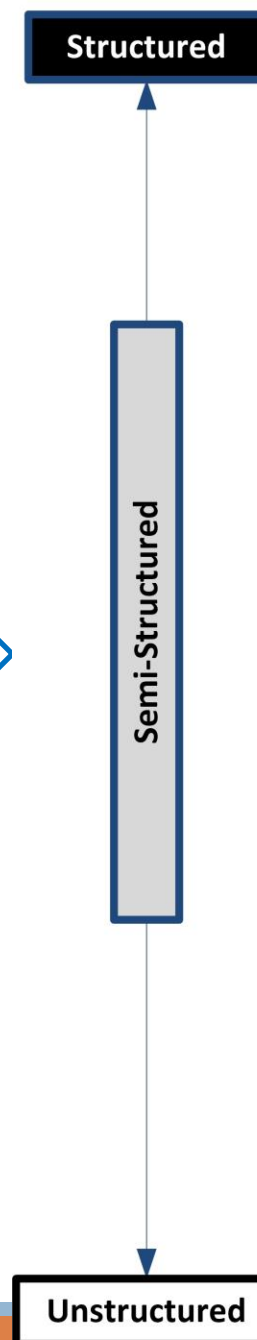
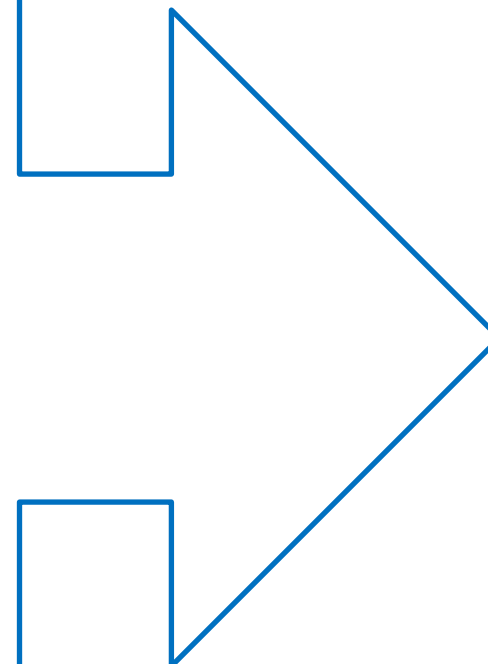
**Design Decisions:  
What level of  
structure makes  
sense given ICT?**

**How consistent will  
your approach be  
across the group of  
participants?**



**Design Decisions:  
What level of  
structure makes  
sense for visual  
stimulus given ICT?**

**How consistent will  
your approach be  
across the group of  
participants?**



**Present stimulus (visual, vignette or game) with limited choice answers or options.**

**Present same stimulus with open-ended questions asked to all participants in the same sequence.**

**Present same stimulus with open-ended questions and follow-ups based on responses.**

**Present stimuli to participants; articulate open-ended questions or follow-ups based on responses.**

**Present stimulus, ask the participant to annotate, edit, rewrite or revise.**

**Navigate a virtual environment or game; ask open-ended questions and discuss visual representations of phenomena.**

**Navigate a physical environment using GPS and mobile devices to discuss representations on location.**

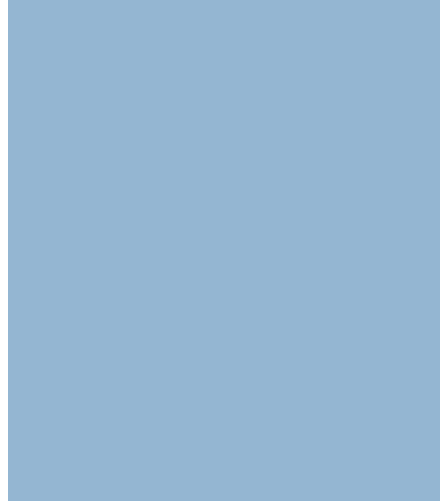
**Researcher and participant collaborate on the creation of visuals, vignettes, etc. to communicate and develop ideas or elicit responses.**

**Use visual stimuli identified or created and/or shared by the participant as the basis for open-ended questions.**

**Unstructured**

c. 2009-2021  
Vision2Lead, Inc.





Design Decision:  
Whose images  
are used?  
Researcher's or  
participants' \_\_\_\_\_  
images or media?





How can researchers  
develop online skills?

Teaching, Supervising,  
and/or  
Coaching  
Researchers





# Dedicated Qualitative Research Software

Historically, qualitative researchers have been forced into using software that was intended for another purpose.

The right tool is:

- Secure
- Efficient
- Built for Qualitative Researchers



# Zoombombing, Location Tracking, and Contact Tracing: Oh My! Data Privacy & Cybersecurity During COVID-19 Pandemic

April 20, 2020

Shannon Holmberg

Dentons Davis Brown

+ Follow

Contact

in LinkedIn

f Facebook

Twitter

Send

Embed

DAVID BROWN

Home > News > Security

## Were You Zoom-Bombed? Video of It Is Now Be on YouTube, TikTok for All to See

Zoom-bombers have been recording their exploits and uploading the footage to YouTube and TikTok. In some cases, the videos are a privacy issue because they show AA and Narcotic Anonymous meetings.

By [Michael Kan](#) April 2, 2020 [f](#) [t](#) ...

# School districts, including New York City's, start banning Zoom because of online security issues

The Washington Post  
Democracy Dies in Darkness

By Valerie Strauss  
April 4, 2020 at 12:31 p.m. EDT



W I R E D BACKCHANNEL BUSINESS CULTURE GEAR IDEAS MORE

SIGN IN SUBSCRIBE

## Why Insider 'Zoom Bombs' Are So Hard to Stop

ANDY GREENBERG

SECURITY FEB 3, 2021 2:09 PM

Researchers have found that most calls to disrupt videoconferences originate with the participants, especially in high schools and colleges.

[f](#) [t](#) [✉](#) [🔖](#)



- Participant Registration
- Automated Communication Tools
- Board & Realtime Project Booking
- Participant Consent
- User Profile Management & Storage

- Secure – GDPR & HIPAA Compliant
- Web-based – no program downloads

## Centralized Project Management

## itracksBoard

Asynchronous Data Collection

[Learn more here](#)

- Online Discussion Boards
- Projects length anywhere from 1-day to Multi-year
- Participants respond on their own time
  
- Web-based (no program downloads)
- Dedicated Mobile App
- Secure – GDPR & HIPAA Compliant

## itracksRealtime

Synchronous Data Collection

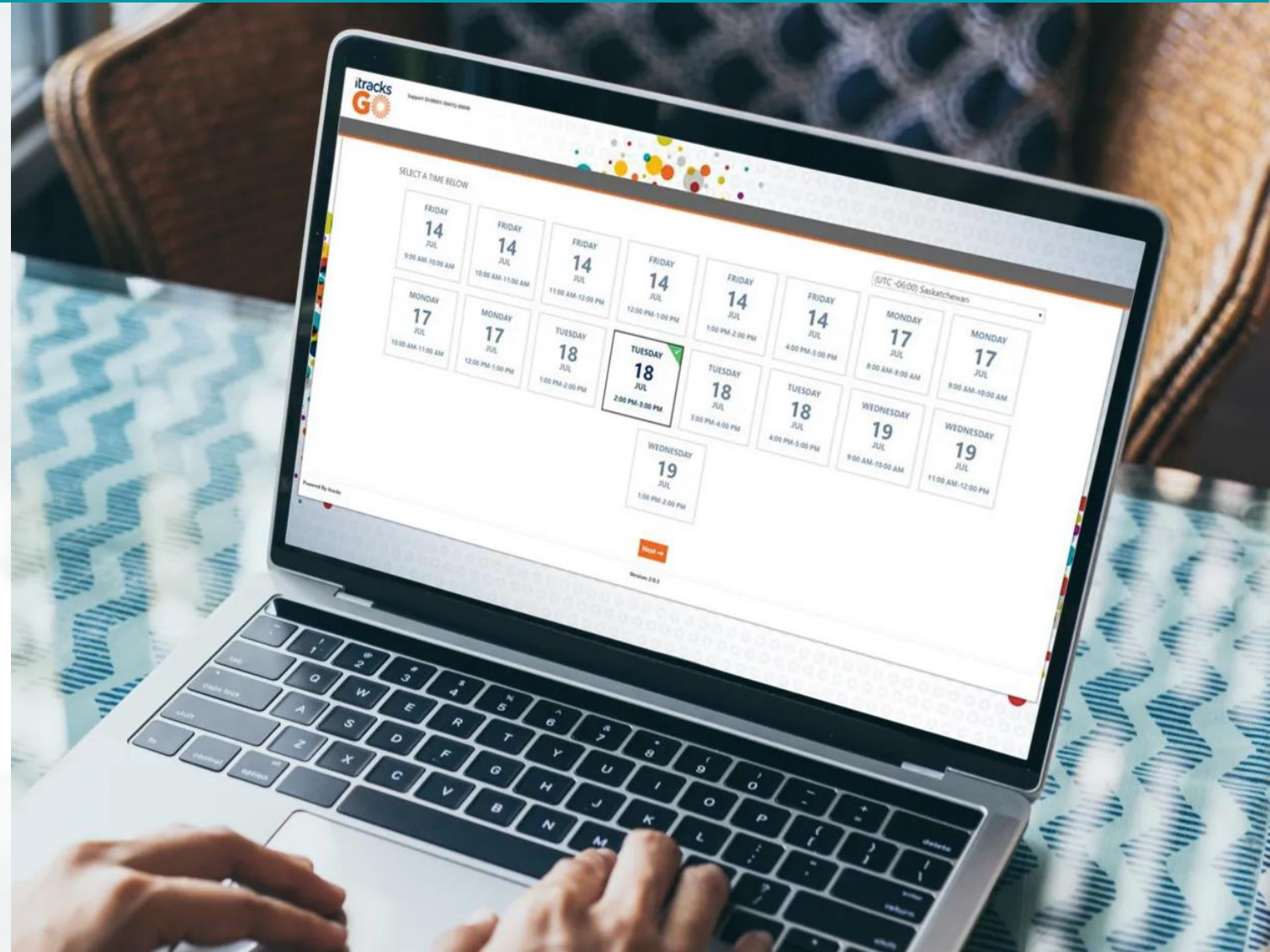
[Learn more here](#)

- Video Interviews
- Video Focus Groups
- Text Focus Groups
  
- Web-based (no program downloads)
- Dedicated Mobile App
- Secure – GDPR & HIPAA Compliant
- Regional Data & Activity Hosting



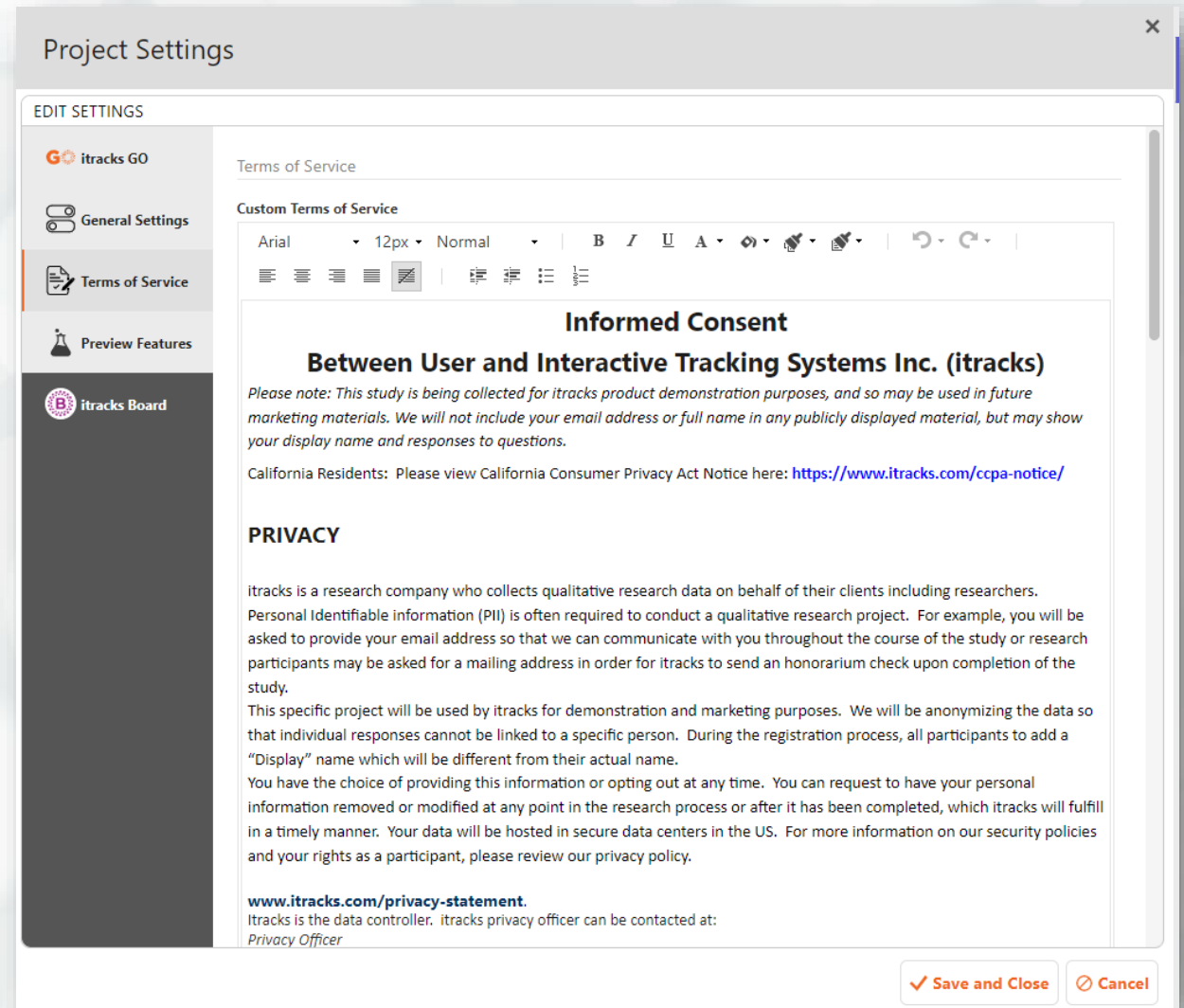
# Centralized Project Management

- User profile management
  - Participant, Observer & Researcher/Moderator
- Consent collection
- Project & Activity Booking
- Automated Scheduling
- Automated & semi-automated communications
- Quant-to-qual integration



# Customized Consent

- Manage consent within platform
- Ensure consent is collected before project progresses



The screenshot displays the 'Project Settings' window with a sidebar on the left containing navigation options: 'itracks GO', 'General Settings', 'Terms of Service' (selected), and 'Preview Features'. Below these is the 'itracks Board' logo. The main content area is titled 'EDIT SETTINGS' and shows the 'Terms of Service' section. It includes a 'Custom Terms of Service' text editor with a rich text toolbar. The text within the editor reads:

**Informed Consent**  
**Between User and Interactive Tracking Systems Inc. (itracks)**  
*Please note: This study is being collected for itracks product demonstration purposes, and so may be used in future marketing materials. We will not include your email address or full name in any publicly displayed material, but may show your display name and responses to questions.*  
California Residents: Please view California Consumer Privacy Act Notice here: <https://www.itracks.com/ccpa-notice/>

**PRIVACY**

itracks is a research company who collects qualitative research data on behalf of their clients including researchers. Personal Identifiable information (PII) is often required to conduct a qualitative research project. For example, you will be asked to provide your email address so that we can communicate with you throughout the course of the study or research participants may be asked for a mailing address in order for itracks to send an honorarium check upon completion of the study.

This specific project will be used by itracks for demonstration and marketing purposes. We will be anonymizing the data so that individual responses cannot be linked to a specific person. During the registration process, all participants to add a "Display" name which will be different from their actual name.

You have the choice of providing this information or opting out at any time. You can request to have your personal information removed or modified at any point in the research process or after it has been completed, which itracks will fulfill in a timely manner. Your data will be hosted in secure data centers in the US. For more information on our security policies and your rights as a participant, please review our privacy policy.

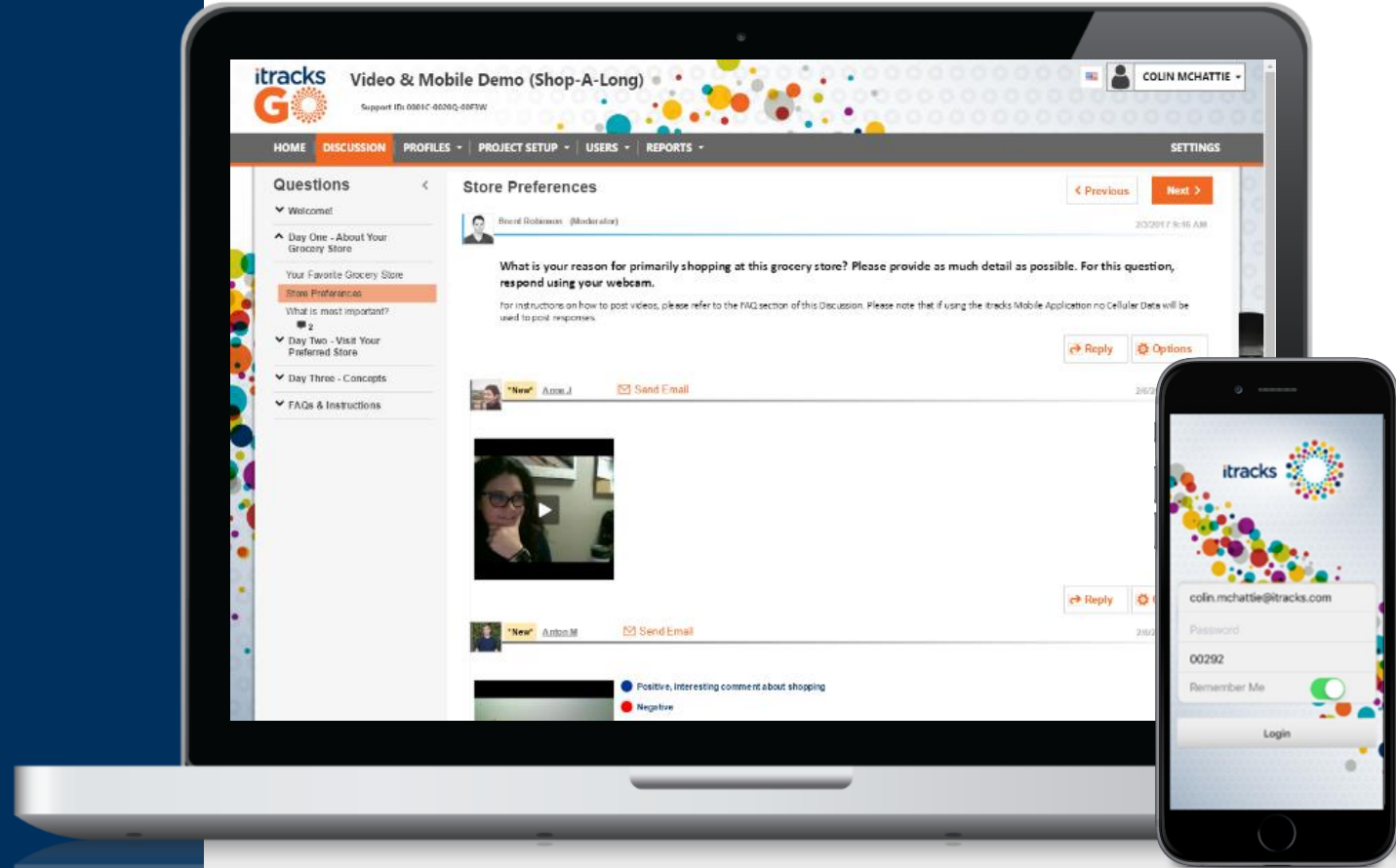
[www.itracks.com/privacy-statement](https://www.itracks.com/privacy-statement).  
Itracks is the data controller. itracks privacy officer can be contacted at:  
*Privacy Officer*

At the bottom right of the window, there are two buttons: 'Save and Close' and 'Cancel'.



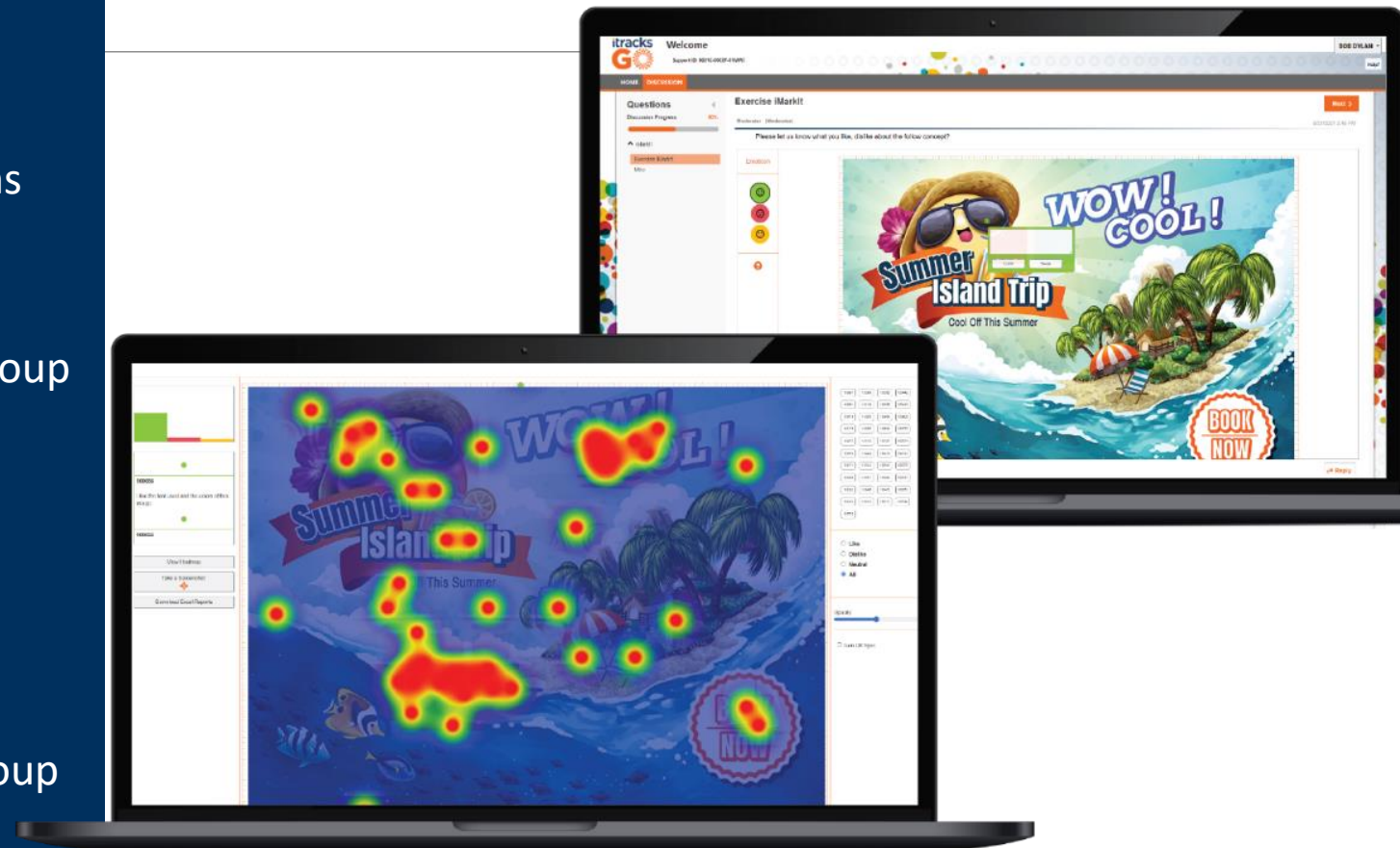
# itracks Board | Asynchronous Data Collection

- Online Discussion Boards
- Text, audio, image, video & polling responses
- Participants respond on their own time
- Used for ethnographies, online communities, shorter online discussions, and more
- Dedicated mobile app helps you reach more participants
- Offline response mode reduces participant burden - they can answer/record video responses from anywhere without using cell phone data
- White-label for your educational institution or brand



# itracks Board | Research Design Ideas

- Incorporate consent form into project to automatically ensure it's been collected from all participants before they access the Board
- Segment participants and hold smaller discussions based on demographics, previous discussions, or other participant characteristics
- Use uninfluenced question modes to minimize group think and bias
- Use as a screener for or as a precursor to synchronous focus groups or interview projects
- Hold several one-on-one discussions in interview mode, all within the same Board
- Do visual markups and discuss the results as a group



# itracks Board | Reporting

The screenshot shows the itracks Board Reporting interface for the project 'Attitudes toward AI Discussion Group'. The user is logged in as KRISTAL RUDYK. The interface includes a navigation menu with options: HOME, DISCUSSION, PROJECT SETUP, USERS, REPORTS (selected), ANALYZE, and SETTINGS. The main content area is titled 'Transcripts' and features three action buttons: 'Export Transcripts', 'Delete All Transcripts', and 'Analyze With NVivo'. Below these is a 'Transcript Settings' section with the following options:

- Include Deleted Posts**:
- Include Private Posts**:
- Include All Posts From**:  Observer,  Moderator,  Technical Support
- Include Post Times**:
- Transcript Format**: Word Format

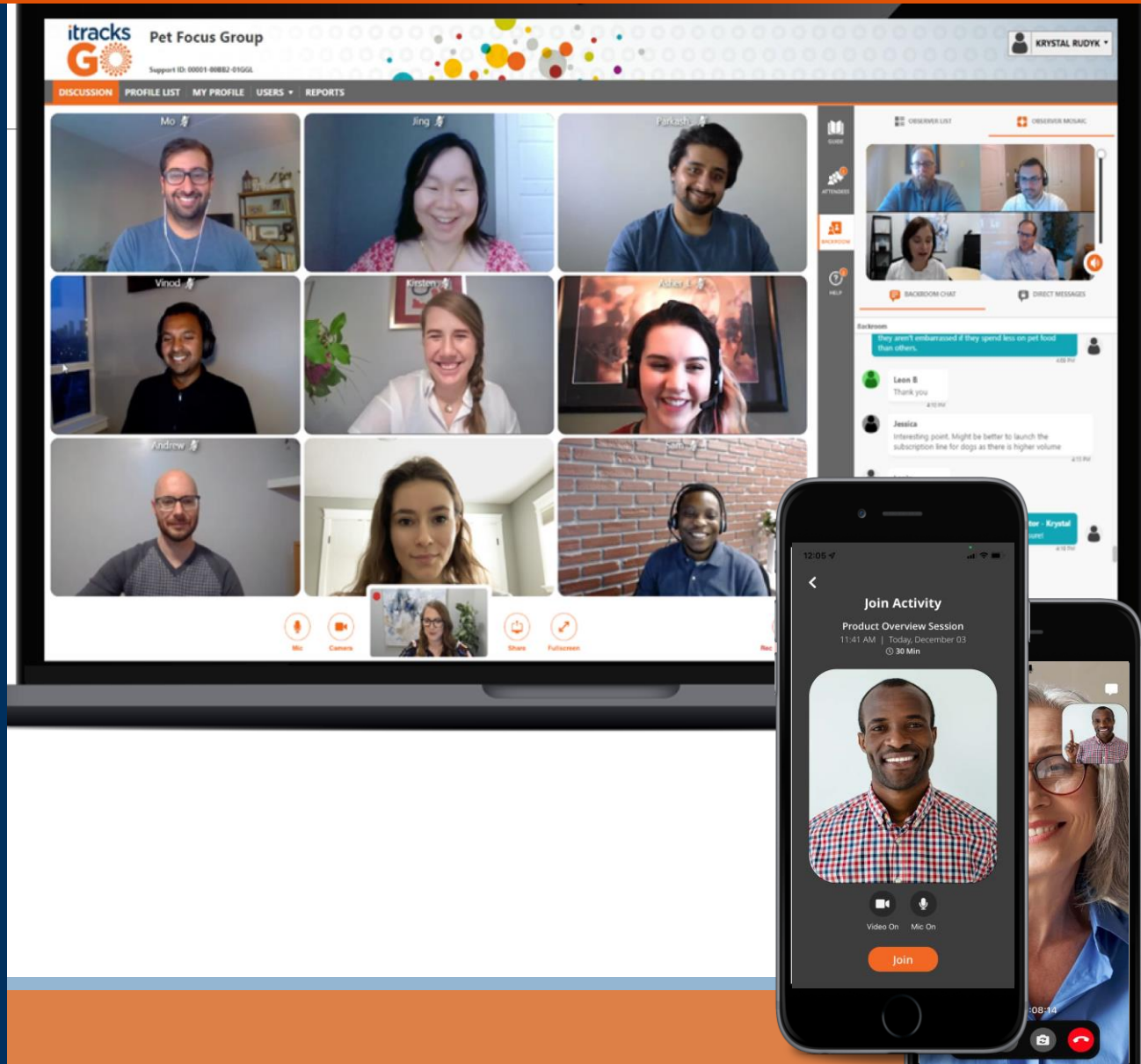
Additional sections include 'Select Participants', 'Select Questions', 'Select Posts', and 'Note Display Options'. At the bottom, there are 'Export Transcripts' and 'Reset' buttons, and a note that asterisks indicate required fields.

- Multimedia transcripts
- Participation statistics
- Completion reports
- Extensive filtering capabilities

# itracks Realtime

## Synchronous Data Collection

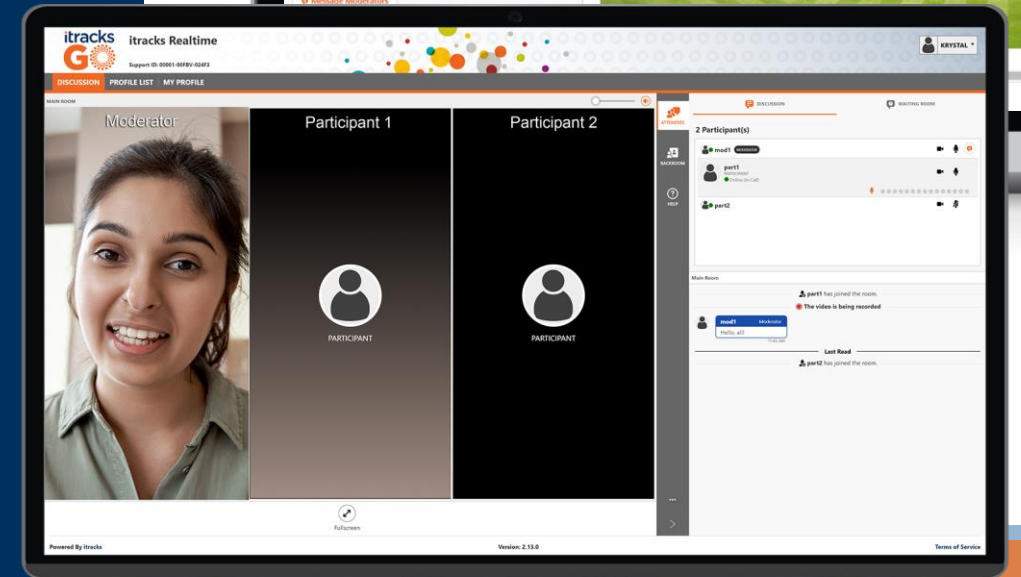
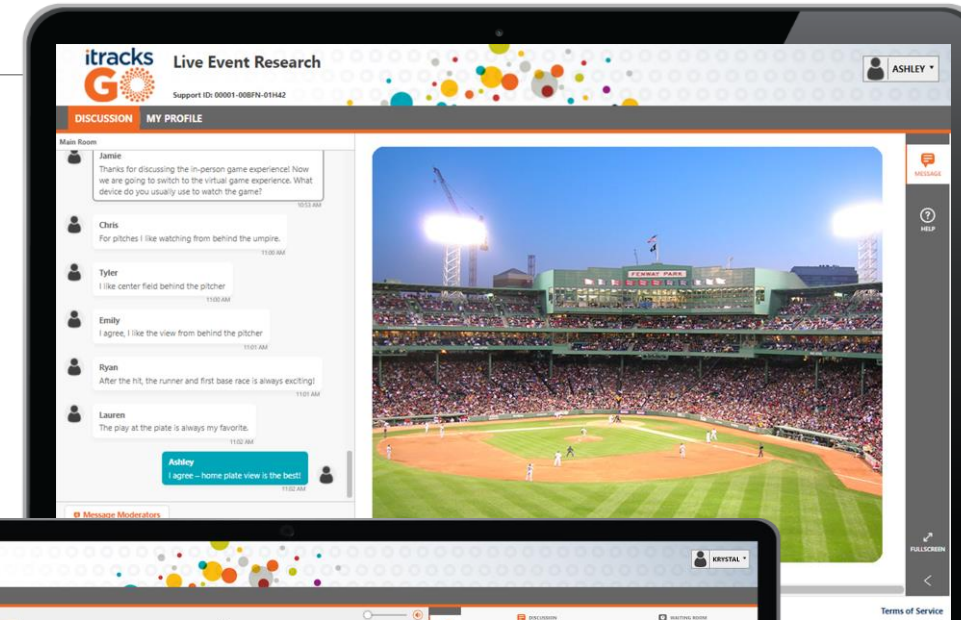
- Video Interviews & Focus Groups
- Text-based focus groups
- Integrated polling
- Dedicated mobile app helps you reach more participants
- Web based – no program downloads
- Intuitive interface – no learning curve for participants
- GDPR & HIPAA Compliant
- Regional Hosting





# itracks Realtime | Research Design Ideas

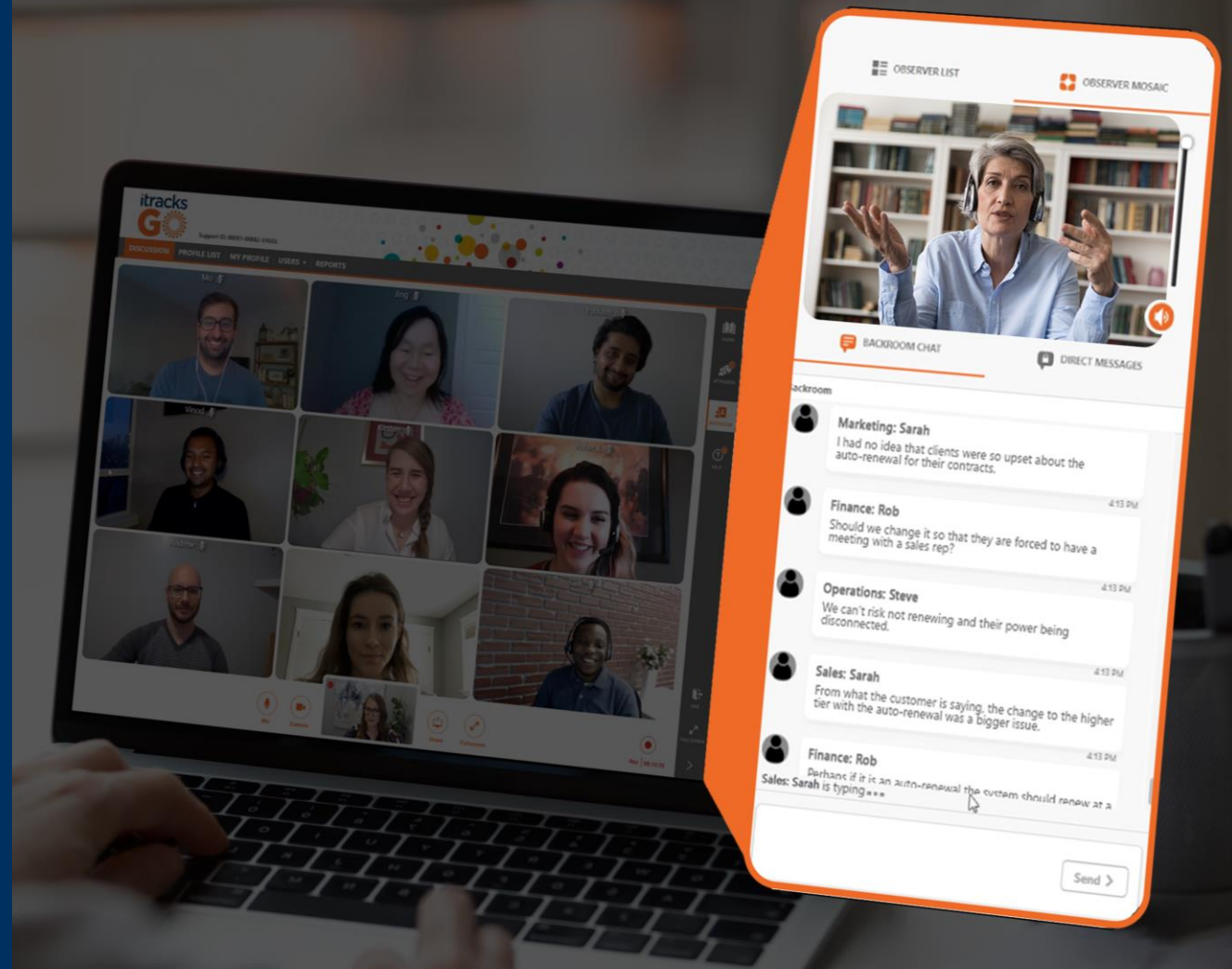
- Use text focus groups for increased anonymity, large groups in a short period of time, or live event research
- Include research assistants or supervisors as “Observers” in the back room, so they can observe the research and communicate with you without distracting participants or compromising the integrity of the discussion
- Use the Discussion Guide to pre-load your scripts and upload stimuli for easy launch in the platform
  - Controls the structuredness of your multi-interview or focus group projects
  - Keeps your focus on the discussion, not the technology
- Use Participant Privacy Mode to preserve facial anonymity in recordings and to observers and fellow participants





# Enhanced Supervisory Experience

Private observer area allows for supervisors (and research assistants, collaborators, stakeholders, or anyone else you want hidden behind the "one way mirror") to provide input without distracting participants.



# itracks Realtime | Reporting

- Group video (with audio) & audio-only recordings
- High quality single-stream video & audio of individual participants
- Auto-transcription
- Conference timeline with text chat, private messaging, observer chat, poll results, stimuli, and other events

The screenshot displays the itracks Realtime Reporting interface. At the top, the itracks logo is visible alongside the text '\*itracks ittracks Canada Leaders Debate Discussion Study' and 'Support ID: 00001-00CQP-00000'. A user profile for 'KRYSTALPM' is shown in the top right corner. The main navigation bar includes 'ACTIVITIES', 'MEDIA', 'USERS', 'BROADCASTER', 'WORKFLOWS', 'REPORTS', and 'ANALYZE'. The central focus is a video player showing a man wearing headphones. To the left of the video is a 'Media Browser' with a search bar and a list of media items, including 'David Project Manager', 'Leaders Debate Fo... Group', 'Jared Participant', and 'Srikant'. To the right of the video player, a metadata panel provides details: 'File Size: 609 MB', 'Actual Dimensions: 1280 x 720', 'Duration: 00:59:31', 'User(s): Project Manager - David', and 'Activity: 01QR8 - Leaders Debate Follow Up Video Chat'. Below this, there are options to 'Download File', 'Full Video', and 'Audio Only', along with a 'Text Transcription' section that notes 'A transcription for this media is not yet available.' and an 'Analyze With NVivo' button. At the bottom of the interface, it states 'Powered By itracks', 'Version: 2.13.2', and 'Terms of Service'.

# Let's Connect

itracks



[sales@itracks.com](mailto:sales@itracks.com)



+1.306.665.5026



[www.itracks.com](http://www.itracks.com)

Trusted By:

MassMutual

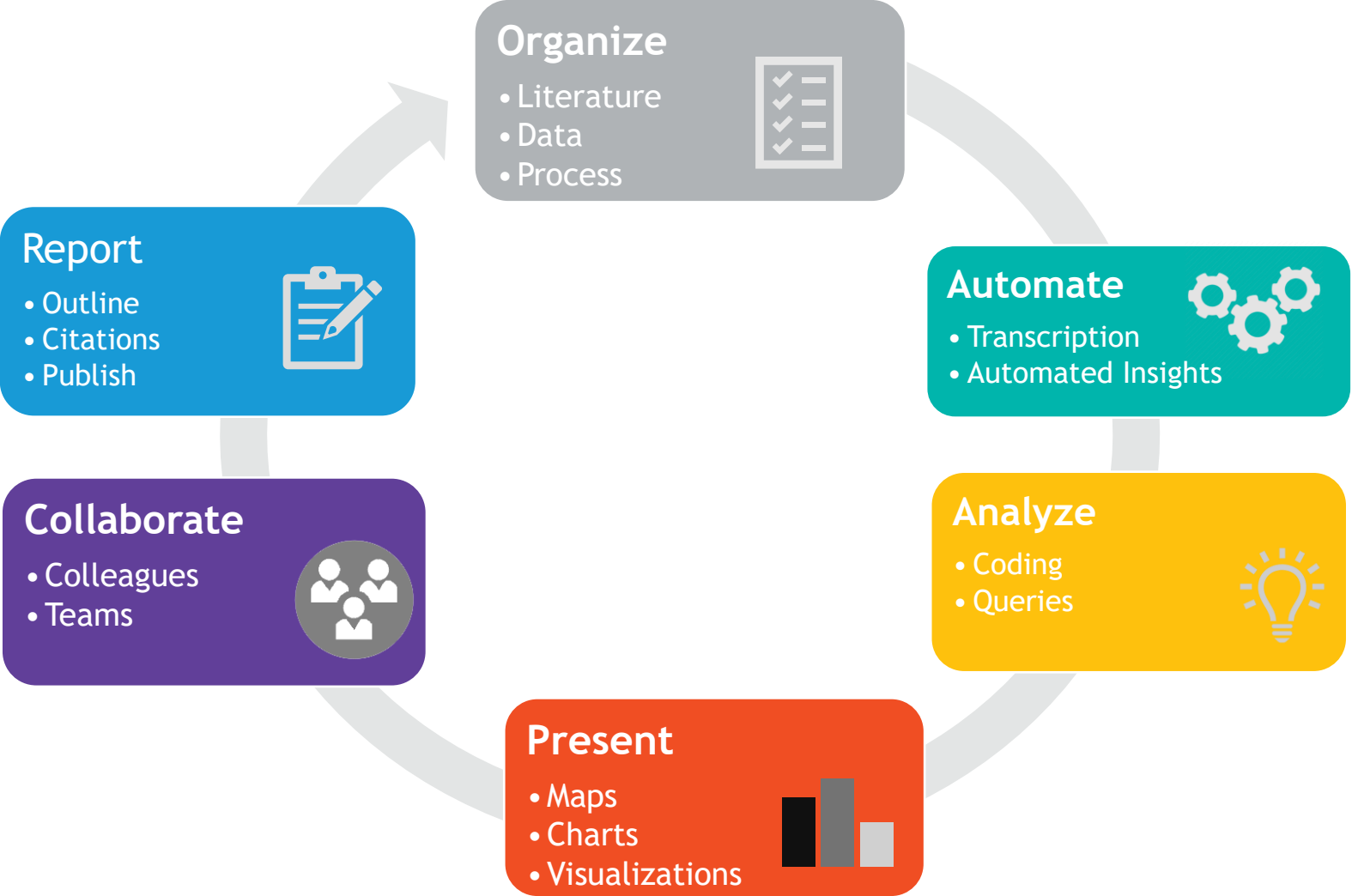
**SKIP** THE DISHES

Crayola

 **POLARIS**

Analyze with NVivo

# The Research Process with Lumivero Solutions





# NVivo Supports A Wide Range Of Data





- 1-1 interviews, groups,
- individual recordings from groups

- Import and code
- Cases for participants
- Classifications – demographics



- Discussion board, videoconference, text chat
- Communication automation

- Import videos
- Code – videos
- Autocode transcripts



- Video and image responses in Board
- Screen sharing, media sharing in Realtime

- Import images
- Add notes about images
- Code on images



- Options in video conference,
- text chat or boards

- Import boards as spreadsheet to create cases
- Code by participant or as a group



- Ability to upload during interview,
- Ability to blur participants

- Anonymous names and information



- Observation room

- Memos based on notes



- Collect within platform

## NVivo 14

- Open projects across both Mac and Windows with ease with NVivo 14 and NVivo Collaboration Cloud users can easily.
- Real Time collaboration with NVivo 14 and NVivo Collaboration Cloud.
- Citavi-NVivo together - integrates your literature review with your empirical data

[Learn More](#)



**MORE**  
Collaboration  
WITH NVIVO 14

[LEARN MORE](#)

NVIVO 

The graphic features a blue-to-teal gradient background with several light blue starburst icons in the upper right corner. The text is white and centered. At the bottom, there is a white bar containing a teal button with the text 'LEARN MORE' and the NVIVO logo on the right.

## Free Resources

- [Getting Started with NVivo Videos](#)
  - [Windows](#)
  - [Mac](#)
- [NVivo eGuide](#)
  - [Windows](#)
  - [Mac](#)
- [On Demand Webinars](#)

## NVivo Academy

- [NVivo User Certification Course](#)
- [Focused Learning Course - Coding](#)
- [Virtual Training & Consultancy](#)
- [Certified Expert Course](#)



# Webinar Series

WEBINAR SERIES

## Evolving Research in Qualitative and Mixed Methods

January - March 2023

[Register Now](#)



 THALIA M. MULVIHILL Ball State University	 RAJI SWAMINATHAN University of Wisconsin-Milwaukee	
 JANET C. RICHARDS University of South Florida, Tampa	 AUDRA SKUKAUSKAITE University of Central Florida	 RON CHENAIL Nova Southeastern University
 GILLIAN ROSE University of Oxford	 JANE ELLIOTT University of Exeter	

[Register Now](#)

WEBINAR SERIES

## Organize your Writing: From First Draft to Publishing

January - April 2023

[Register Now](#)



 ROBERT THOMAS University of Cardiff	 KENNETH A. KIEWRA University of Nebraska- Lincoln
 SORAYA M. COLEY Cal Poly Pomona	 JANET SALMONS SAGE Publications
 MARGARET-MARY SULENTIC DOWELL Louisiana State University	 TYNISHA D. WILLINGHAM Mary Baldwin University

[Register Now](#)

# Lumivero Community: Continue the Discussion

## Share and Learn

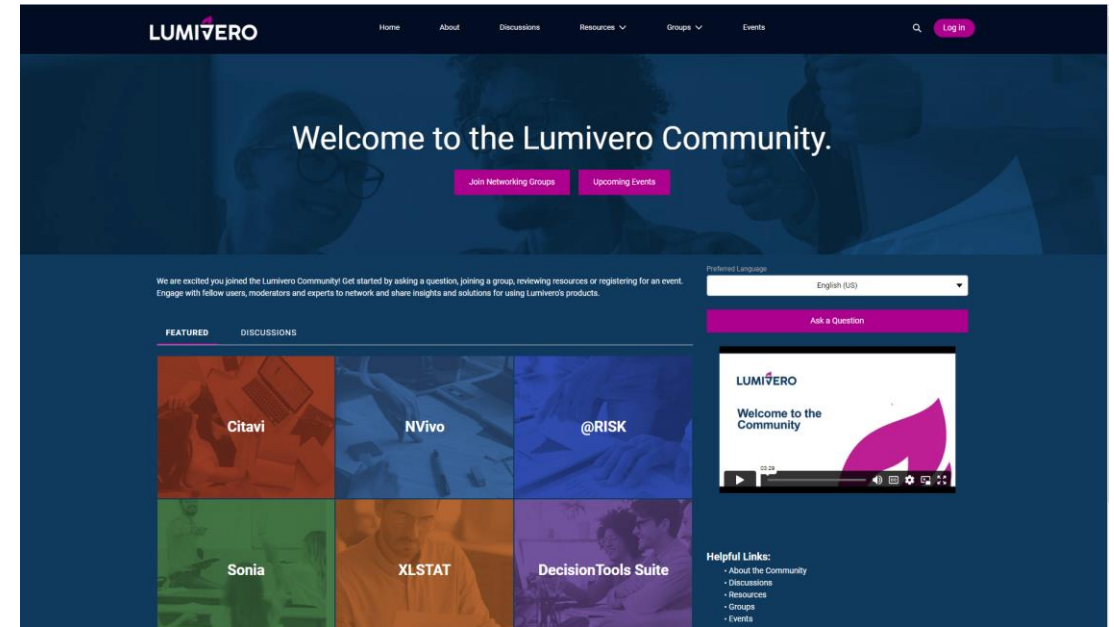
- [Research Webinars](#)
- [Podcast: Between the Data](#)
- Lumivero Virtual Conference 2023

## Connect

- Product User Groups
- Research Groups

## Funding Opportunities

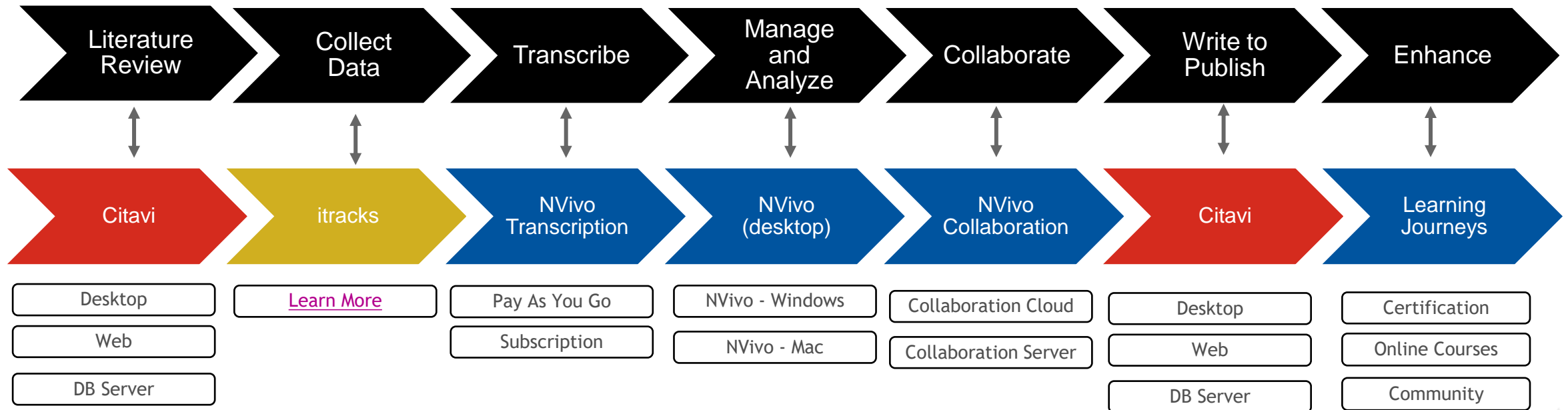
- Early Career Researcher Grant - 2024



[Join Now](#)

# Lumivero Data Landscape Solutions

## The Research Process



[Learn More](#)